

# CAPSTONE COACHING PROGRAM

Capstone coaching supports effective succession development by helping retirement-age leaders and key personnel intentionally consider, plan, and execute their retirement from the organization. An experienced leadership coach guides coachees through a process to ensure knowledge transfer, while helping the leader plan for and embrace their post-career life. The coach helps the leader navigate the transition with internal stakeholders and prepare to seamlessly exit the organization with the focus and insights they need to support the transition to retirement. This allows the leader to stay engaged in their role and the organization to building long-term talent succession.

We use a structured process to facilitate planning, communication, and knowledge transfer while engaging with the leader to assess, plan for, and embrace the next steps in their post-career life. This proven method helps the coachee explore situations with a new perspective, understand themselves in new ways, create new mindsets for approaching their future situations, and build new and more productive post-career strategies.



## WHEN IS CAPSTONE COACHING APPROPRIATE ?

This unique type of coaching is the ideal development solution for a number of different scenarios and is recommended in the following situations:

- Leaders considering retirement in 1-2 years
- Leaders who may be struggling with the decision to retire from the organization
- Long-tenured employees wanting to prepare for next generation leadership
- An organization looking to provide open and planful transitions from the organization
- An organization wanting to provide a benefit to long serving employees to assist with the next life stage



## EXPECTED OUTCOMES

The coaching process includes defining and aligning on successful outcomes for the coachee. We have found that the following value is typically created from coaching process:

- Facilitates an open and planful transition timeline, both for the leader and the company
- Creates a longer transition process and helps motivate some leaders to begin the retirement process
- Maintains leader productivity and engagement up to the last day
- Cultivates and preserves a positive company culture
- Helps to align expectations between the employee and company
- Enables more robust talent planning

## THE CAPSTONE COACHING PROCESS

1

### FOUNDATION

Build trust between coach and coachee and establish a coaching plan.

2

### COLLECT & ASSESS DATA

Collect data from retirement assessment tools to inform the current situation and coaching goals.

3

### PLANNING

Establish a coaching conversations and knowledge transfer plans aligned with the leader and organization's objectives.

4

### COACHING & FOLLOW-UP

Hold coaching sessions to create new insights, and accountability plans for the future.

Coachee, coach, and sponsor summarize program achievements and define ways for the organization and coachee to best use these insights.

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